

*Citation for published version:*

Lee, Z & Davies, I 2021, 'Navigating *relative invariance*: Perspectives on corporate heritage identity and organizational heritage identity in an evolving nonprofit institution', *Journal of Business Research*, vol. 129, pp. 813-825. <https://doi.org/10.1016/j.jbusres.2019.05.038>

*DOI:*

[10.1016/j.jbusres.2019.05.038](https://doi.org/10.1016/j.jbusres.2019.05.038)

*Publication date:*

2021

*Document Version*

Peer reviewed version

[Link to publication](#)

*Publisher Rights*

CC BY-NC-ND

**University of Bath**

**Alternative formats**

If you require this document in an alternative format, please contact:  
[openaccess@bath.ac.uk](mailto:openaccess@bath.ac.uk)

**General rights**

Copyright and moral rights for the publications made accessible in the public portal are retained by the authors and/or other copyright owners and it is a condition of accessing publications that users recognise and abide by the legal requirements associated with these rights.

**Take down policy**

If you believe that this document breaches copyright please contact us providing details, and we will remove access to the work immediately and investigate your claim.

# **Navigating *relative invariance*: Perspectives on corporate heritage identity and organizational heritage identity in an evolving nonprofit institution**

**Dr. Zoe Lee & Dr. Iain A Davies**

**University of Bath**

**Accepted for Publication in Journal of Business Research**

## **Abstract**

The notion of relative invariance is highlighted as a foundational principle in how corporate heritage identity traits can remain the same, yet change in meaning over time. Yet, little is published regarding how this notion manifests, or how corporate heritage stewards manage it in identity challenging situations. Utilizing a case study of one of the UK's oldest cancer charities, we highlight how two groups of protagonists – heritage defenders and service innovators – shape the meaning of corporate heritage identity over time. We explore four core tensions that expose the multifaceted and complex nature of relative invariance and identify specific integration and compartmentalization strategies utilized to restore balance, allowing for the continued meaningfulness of corporate heritage identity. Overall, our study advances the notion of relative invariance, providing a more complete understanding of stewards' affinity toward corporate heritage and extending the field of corporate heritage identity into the nonprofit sector.

**Keywords: Corporate heritage identity, organizational heritage identity, relative invariance, nonprofit branding, multiple heritage identities**

## **1. Introduction**

The aim of this article is to further investigate Balmer's (2011b) notion of relative invariance in relation to corporate heritage identity, where relative invariance suggests that heritage identity organizations "appear to remain the same and yet change" over time (Balmer, 2011b, p.1387; Balmer, 2017, p.175). The study explores how organizational members, or heritage identity stewards (Burghausen & Balmer, 2015), negotiate the process of maintaining corporate heritage identity traits, while changing the meaning of corporate heritage identity for the future. In doing so, we seek to expand our understanding of the fields of corporate heritage identity (Balmer, 2011b) and organizational heritage identity (Balmer & Burghausen, 2015a; Balmer & Chen, 2015).

Corporate heritage identity refers to a distinct type of institutional identity where identity traits can remain meaningful and yet invariant over the passage of time (Balmer, 2011b; Balmer, 2017; Balmer & Burghausen, 2018). This study focuses on the corporate heritage identity of one of the oldest and largest UK charities, Macmillan Cancer Support. The charity, established in 1911, provides support for those living with (and dying of) cancer. With a nationally recognized corporate heritage trait in palliative (end of life) care, the organization currently faces the challenge of the changing story of cancer, in which people are increasingly living with and beyond cancer from a much younger age. Thus, to remain relevant into the future, Macmillan began to change not only its spectrum of service delivery, but also the stakeholder base it works with, thus challenging the meaning of corporate heritage identity to its multiple stakeholders. The corporate heritage identity is, therefore, being repurposed for its present and future needs, keeping the heritage traits consistent, but changing their meanings for stakeholders. This is consistent with Balmer's (2011b) theory of relative invariance of corporate heritage identity traits. However, this notion has received little attention (Brunninge, 2017; Burghausen & Balmer, 2014; 2015) in the extant scholarship and thus, our understanding

of the different roles organizational members play in these heritage identity challenging situations remains limited.

Early studies on corporate heritage emerged from an interest in understanding monarchies as corporate brands (Balmer, Greyser & Urde, 2006; Balmer, 2009), and, subsequently, the corporate heritage brand construct (Balmer, 2009; 2011a, Urde, Greyser & Balmer, 2007). Later, research introduces the corporate heritage identity construct (Balmer, 2011b; Balmer, 2013) before expanding into the domains of corporate heritage marketing and the notion of total corporate heritage communications (Balmer, 2013). One significant development has been the exploration of organizational heritage identity, introduced by Balmer and Chen (2015). Organizational heritage identity refers to claimed heritage identity traits of an organization as conceived by organizational members (Balmer & Burghausen, 2015a). Balmer and Burghausen (2015a) marshalled the three literatures of corporate heritage, organizational identity and organizational memory, to investigate how corporate insiders perceive, identify with, and create multigenerational cultural traits of heritage identity. In doing so, they augment the study of corporate heritage brand and identity with a greater focus on the employees as key stakeholders in the stewardship of corporate heritage identity. Having the support of employees during the process of internalizing new meanings for corporate heritage identity is important to ensure trust and perceived authenticity from stakeholders (Balmer, 2011b). However, little has been written about how employees respond to distinct periods of relative invariance in corporate heritage identity and the impact change has on their identification with the heritage institution.

At a macro level, corporate heritage identities relate to corporate heritage identity attributes, such as corporate purposes, activities, competencies, cultures, philosophies and

strategies; while at the micro level, they relate to design heritage, advertising and communication heritage, sensory heritage and architectural heritage (Balmer, 2011b). Balmer (2011b) refers to these attributes as “distinct institutional traits which have remained meaningful and invariant over the passage of time and that such meanings can vary with the passage of time” (p. 1385). It is, therefore, important to appreciate the enduring nature and stability of key corporate heritage identity traits, and equally recognize that these traits may need to respond to changes of meaning over time in order to sustain a bi-lateral trust between the organization and its stakeholders (Balmer, 2011b).

However, it must also be kept in mind that corporate heritage identities have multiple-role identities (Balmer, 2011b; Balmer, 2013), that can symbolize multiple identities to stakeholders, and confer these identities to people and society in an omni-temporal way (Balmer, 2013; Balmer & Chen, 2015; Balmer & Chen, 2017a, 2017b). In linking the complexity of corporate heritage identity to organizational identity and organizational memory, Balmer and Burghausen (2015a) provide the lens through which we can explore the relative invariance of corporate heritage identities. By investigating organizational heritage identity, through the eyes of the employees when facing identity-challenging situations, there is the opportunity to explore the changes of meaning and processes through which this is managed. By focusing on the case of one of the oldest and largest UK cancer charities, during a particularly turbulent and identity challenging period in the organization’s history, the study contributes to our understanding of the employee’s role in maintaining the relative invariance of corporate heritage identity. However, it also expands the field of study in corporate heritage identity into the nonprofit sector, where several corporate heritage brands reside. The study, therefore, explores employee interpretations of ‘who we are’ at present, and for the future, as each individual negotiates their personal connection to the organization during a distinct period of change.

In the remainder of the article, we continue by reviewing the literature on corporate heritage identity, stakeholders and organizational heritage identity. Then, we discuss specific relationships between corporate heritage identity within nonprofit organizations and how stewards may face challenges in managing relative invariance. A description of the empirical case, the method, and the data analysis follow. Thereafter, we present the findings and conclude with a discussion of the theoretical and managerial implications, research limitations, and suggestions for future research.

## **2. Literature review**

The following sections explore the multiple-role identities of corporate heritage institutions, the relative invariance of these identities, and their meaning to multiple different stakeholders. We highlight that research by exploring how identity adaptation in identity challenging situations in multiple role identity organizations is limited, not only in corporate heritage identity, but also in organizational identity studies more generally. We then draw specific attention to the issues of multiple role identities in nonprofit organizations, where multiple heritage identities co-exist alongside other identities related to delivering social good, and fund-raising. We therefore highlight the need for research in both heritage nonprofits and heritage identity stability in challenging situations.

### *2.1. Corporate heritage identity*

Balmer (2011b) formally introduced the notion of corporate heritage identity. He identifies that heritage institutions have certain identity traits that are perennial. In addition to these perennial traits, corporate heritage identities are meaningful because they are imbued with “multiple role identities” or “augmented role identities” (Balmer, 2011b; 2013). This is of significance as such heritage institution can become associated with people, places, communities and cultures over time. For example, in that seminal article, Balmer (2011b), furthered by Balmer (2013), identified both Utilitarian (corporate, economic) identity and Normative (societal / heritage) identity in heritage institutions, which can encompass temporal, territorial, cultural, social and ancestral identity within one corporate heritage identity. Previous studies similarly show these multiple role identities, such that the Crown not only has meaning as a legal and constitution entity (Head of State), but also in terms of its symbolic and cultural role (Head of Nation) (Balmer, 2004; 2008; 2009, 2011b; Cornelissen, Haslam & Balmer, 2007). Similarly, Chinese medicinal corporate heritage brand Tong Ren Tang, has a National cultural identity, Familial identity and Imperial identity (Balmer & Chen, 2015; Balmer & Chen, 2017b), in addition to Balmer’s (2013) list of corporate heritage identities. These studies show that multiple role identities are perceived by stakeholders of heritage institutions, and that these institutions can have many different meaningful identities.

These insights into multiple role identities borrow from earlier insights into both corporate identity (see Balmer, 1998; Hatch & Schultz, 2003; Leitch & Motion, 1999) and organizational identity literatures (Albert & Whetten, 1985; Dutton & Dukerich, 1991). These literatures explore what stakeholders view as central to an organization’s character, which endures over time, and makes them distinct from other organizations (Gioia, Patvardhan, Hamilton & Corley, 2013). The study of multiple role identities is founded in Albert and Whetten’s (1985) identification of “an organization whose identity is composed of two or more types that would not normally be expected to go together” (Albert & Whetten, 1985, p. 270).

Balmer (2011b; 2013) takes an alternative twist on this by identifying corporate heritage identity as being augmented, such that the multiple role identities are hybridized into a single holistic corporate heritage identity. However, the extent to which corporate heritage identities remain stable when faced with identity challenging situations has received limited exploration (Burghausen & Balmer, 2015).

Balmer's (2011b) identification of relative invariance in corporate heritage identity does indicate that multiple role identities do not remain stable over time, as pressures are put on them to adapt. Blombäck and Brunninge (2016) identify instability in corporate heritage identity in family firms, due to the pressures put on organizations to conform to different stakeholders' expectations. Similarly, in Burghausen and Balmer (2015, p.42) we see employees "marshalling" the corporate heritage identity, to protect it from erosion over time.

However, beyond Balmer's (2011b; 2013) theorization and empirics from Blombäck and Brunninge (2016) and Burghausen and Balmer (2015), there is limited exploration of the impact of identity challenging situations on multiple role identity organizations in general, let alone heritage identity organizations. Prior empirical research on identity stability has only been conducted on single-identity organizations, and the results have been somewhat inconclusive. Some scholars suggest organizational identity is fairly stable when faced with identity-challenging situations (Elsbach & Kramer, 1996; Hannan, Baron, Hsu, & Koçak, 2006; Tripsas, 2009). Others suggest identity can and does change when there are threats to identity (Dutton & Dukerich, 1991; Petriglieri, 2011; Reger, Gustafson, Demarie, & Mullane, 1994). Balmer's (2013) suggestion of relative invariance does, however, indicate multiple role identities do vary (at least in meaning) over time. Nevertheless, the extent to which multiple identities cause organizational tension depends on their (in)congruence and the emotional attachment stakeholders place on their interpretations of the organization (Chenhall, Hall & Smith, 2016; Glynn, 2000). In the case of corporate heritage identities, this emotional



attachment by stakeholders can be particularly intense (Balmer & Chen, 2015), and thus it falls to stewards of that corporate heritage identity to maintain the invariance and ongoing meaning to different stakeholders in an omni-temporal way.

## *2.2. Stakeholders, corporate heritage identity and the significance of organizational heritage identity*

Corporate heritage identity as a distinct identity type is meaningful for multiple stakeholders, including employees, customers, suppliers, distributors and local communities. To date, research tends to focus on the external stakeholder, such as customers and their satisfaction with a corporate heritage brand such as Tong Ren Tang (Balmer & Chen, 2015; Balmer & Chen, 2017a). Wiedmann et al. (2011) demonstrate significant effects of corporate brand heritage on consumers' attitudes and behavior in the automotive industry. Conversely, Rindell, Santos and De Lima (2015) investigate how organizational views of corporate heritage identity can differ from consumer interpretations, foreshadowing the emergence of organizational heritage identities literatures (Balmer & Chen, 2015).

In introducing the idea of organizational heritage, Balmer and Chen (2015, p. 202) argue that “the significance of heritage to organizational members of the broad corporate heritage notion opens extant corporate marketing scholarship on the territory to scholars within the organizational behavior field. As such, the extant concepts of organizational identity, organizational identification can be adapted within a corporate heritage context viz: organizational heritage/organizational heritage identities and organizational heritage identification”. Balmer and Burghausen (2015a, b) provide the grounding for investigating the employees' perceptions of corporate heritage identity, as well as for investigating how challenges to this corporate heritage identity affect the employees' identification with their

organization. In drawing together the corporate heritage literature with organizational identity (Albert & Whetten, 1985), organizational identification (Ashforth & Mael, 1989) and organizational memory (Nissley & Casey, 2002; Walsh & Ungson, 1991) literatures, organizational heritage identity refers “to perceived and reminisced omni-temporal traits – both formal/utilitarian and normative/societal – of organizational members’ work organization” (Balmer & Burghausen, 2015a, p. 403). Such a view provides an important lens for understanding how employees perceive their organization’s heritage identity traits, not only in retrospective terms, and in the present, but in omni-temporal terms as they take meaning and relevance from the corporate heritage identity for the past, present and future direction of the organization.

Blombäck and Brunninge (2016) demonstrate how organizational heritage identity can diverge from the interpretations by external stakeholders, showing that when family businesses interact with multiple stakeholders, they must communicate their intended identity differently toward certain stakeholders to ensure long-term success. Their evidence of diverging identities (owners vs company), and the need to strike a balance between the influence of business and family identities, may prove challenging for many organizations and their people. This finding shows the need for managers to act as custodians to successfully steward corporate heritage identity; therefore, the notion of corporate heritage identity management emerged, most notably in Burghausen and Balmer’s (2014; 2015) investigation of managers’ collective understanding of corporate heritage identity in Britain’s oldest brewery. Linking the importance of the employees’ omni-temporal perception of corporate heritage identity to Burghausen and Balmer’s (2015) idea of corporate heritage identity stewardship, we begin to identify the explicit roles for employees in managing corporate heritage identity over time. Corporate heritage identity stewardship explores the employees’ role in maintaining the core elements of corporate heritage identity during periods of change (Burghausen & Balmer, 2014;

2015). The focus of stewardship is on managers' mind-sets in nurturing, maintaining and protecting corporate heritage brand, while balancing continuity and change (Burghausen & Balmer, 2015). Balmer (2011b, p. 1386) argues there is a role for managers to "marry brand archaeology, a concern about brand provenance and historic attractiveness, with brand strategy, marshalling the corporate heritage brand to maintain its brand salience and competitive advance for the future". Blombäck and Brunninge (2016) similarly suggest that reference to strong values, founders and tradition help to reject or legitimize decisions in heritage organizations for the future. Brunninge and Hartmann (2018) take this a step further, suggesting stewards may even create 'invented corporate heritage', such as communicating a part of corporate heritage which is fictitious in order to be perceived as authentic by consumers. Although such studies represent important advances, they do not focus on distinct periods of managerial challenge, nor on potential tensions between the multiple role identities in heritage identity organizations, which we aim to further in this study.

### *2.3. Corporate heritage identity in nonprofit organizations*

Despite nonprofits not being corporations, we will still use the term corporate heritage identity in relation to nonprofit heritage identity for theoretical consistency purposes. Billis (2010) draws specific attention to the unique challenges of managing third sector organizations, such as nonprofits, community organizations, social enterprises and co-operatives. Such entities attempt to balance multiple role identities with multiple stakeholder expectation, such as raising funds/revenue and creating social good. However, recent research shows nonprofit organizations with strong corporate heritage brands are successful in engaging and retaining their volunteers (Curran et al., 2016; Mort, Weerawardena & Williamson, 2007). This is because volunteers buy into the brand related stories (Merchant & Rose, 2013) attributed to corporate heritage brand traits, such as longevity, core values, use of symbols, and importance

of history (Urde et al., 2007). Thus, stakeholders have a sense of trust, continuity and comfort from past connections and become more dedicated to the nonprofit organization over time. Charities, such as the Royal British Legion (red poppy), and Amnesty (wire-clad candle), have a rich history, with tangible heritage traits that can positively enhance stakeholder perceptions of authenticity and brand choice (Mohart et al., 2015). Interestingly, few charities actively take advantage of this asset, failing to incorporate heritage into their long-term branding strategy (Kylander & Stone, 2012). Although nonprofit brand orientation is well established and has been linked to an increase in performance (Ewing & Napoli, 2005; Napoli, 2006; Urde, Baumgarth & Merrilees, 2013), we know little about how to manage corporate heritage identities in these nonprofit organizations, particularly in dealing with identity challenging situations.

Emotional attachment by stakeholders can be particularly intense with heritage identity organizations (Balmer & Chen, 2015), and for heritage third sector organizations where stakeholders may have considerable power in the organization as patrons and donors, this attachment may be intensified further (Balser & McClusky, 2005). In managing nonprofit corporate brand heritage, Curran et al. (2016) warn about making radical change to the heritage identity, suggesting stewards should safeguard and ensure the retention of their corporate brand heritage for existing stakeholders. However, the volume of research in this area is small, and nonprofits must also adapt, as with other corporate heritage brands, to changing environments (Balmer, 2013). Therefore, we identify nonprofit organizations as an under studied and fruitful context for understanding corporate heritage identity, and, particularly, for understanding the tensions and means by which they are managed by corporate heritage identity stewards to maintain corporate heritage identity during periods of change. As such, the objective of this study is to explore the tensions caused and strategies employed by corporate heritage identity

stewards to maintain nonprofit corporate heritage identity traits during a period of challenge to their organizational heritage identities.

### **3. Method**

Investigations into the dynamics of changing environments, and particularly investigating organizational identity in periods of change, favor highly contextualized and qualitative approaches to data collections (Brown & Humphreys, 2006; Gioia et al., 2013). Case studies lend themselves to this type of enquiry, as they are ideal for investigating contemporary phenomena within their real-life context (Yin, 2003). As organizational heritage identity is embedded in the cultural fabric of the organization, a case study methodology that gains a deep understanding of the organizational environment provides an ideal approach in gaining unique insight into this complex phenomenon (Gillham, 2010). Similarly, as this is an emerging field with limited theoretical development, a single revelatory case (Yin, 2003), exploring employees' perceptions of organizational heritage identity during an identity challenging situation, is valuable due to its ability to illustrate complex phenomena within its context (Siggelkow, 2007).

The research objective in this study is exploratory and thus lends itself to an iterative and interpretivist case study design (Gillham, 2010), as opposed to the more positivistic approach (Yin, 2003). This means the case was undertaken without predetermined theoretical categorizations since these are expected to unfold as the analysis develops (Gillham, 2010).

#### *3.1. Case Selection*

Macmillan Cancer Support is a particularly revelatory case for exploring corporate heritage identity, organizational heritage identity and organizational heritage identification because it is an organization that for more than 100 years has served multiple generations, even

of the same family, when their need is greatest. Table 1 demonstrates the suitability of this case for the study of corporate and organizational heritage identity by comparing it to Balmer's (2013) corporate heritage criteria.

[Insert Table 1 Here]

Macmillan Cancer Support is one of the UK's largest charities, widely known for its Macmillan Nurses: providers of palliative (end of life) care as part of the UK's National Health Service (NHS). It was the first charity dedicated to preventing cancer and to bringing relief to those with the disease. The vision of its founder, Douglas Macmillan, was to transform the way in which cancer care was delivered in the UK. Unlike other cancer charities that lead on medical research to fight the disease, Macmillan Cancer Support positioned itself as improving the lives of people with cancer. Early on, Douglas Macmillan realized that to care for patients and their families with cancer required more than medicine, drugs, radiotherapy and surgery (Ross, 2009).

The charity originally began in 1911 as *The National Society for the Prevention and Relief of Cancer*. The importance of understanding and treating cancer was topical at the time, with King Edward VII issuing a challenge to doctors and scientists in 1901 saying:

*There is still one...terrible disease which has, up to now, baffled the scientific and medical men of the world, and that is cancer. God grant that before long you may be able to find a cure for it, or check it in its course...* (Ross, 2009, p. 12)

From 1911 to the present day, Macmillan-supported hospices have been the lynch-pin of palliative care in the UK. However, as early as 1931, Douglas Macmillan understood the need to radically change cancer services; for example, shifting cancer care in hospitals to patients' homes. However, the real impact of their work began when they augmented palliative care via home visits and hospices by developing a partnership with the NHS, funding the first Macmillan Nurses in 1975. Macmillan Nurses are uniquely trained for dealing with the end of

life, palliative care, for those with terminal cancer. The deal agreed with the NHS was for Macmillan to pay for the first three years of the nurses' employment and provide the relevant training. These nurses would then transfer to being fully employed by the NHS but retain the name Macmillan Nurse (and Macmillan logo on their name badges), providing a highly tangible and national heritage identity role for Macmillan in the UK.

However, due to the changing nature of cancer care, in 2006, Macmillan embarked on an organization-wide change programme that involved a radical change to its purpose, name and visual identity. The charity changed its name from *Macmillan Cancer Relief*, to *Macmillan Cancer Support*, dropping the word 'Relief' to align themselves more closely with their changing activities related to living with cancer, rather than providing palliative care. The initiative triggered considerable negative reaction, not only among employees, but supporters and other charities. This case, therefore, provides a unique multi-stakeholder insight into the issues of relative invariance in corporate heritage identity during an identity challenging situation. On one hand, Macmillan's identity is strongly linked to the huge success of the hospices and Macmillan Nurses, which are powerful tools for fundraising. Conversely, the organization is concerned about the over-emphasis on palliative care, as that does not currently align with their activities in terms of cancer care services for those living with, rather than dying from, cancer. More importantly, these decisions must meet the expectations of different stakeholders internally and externally.

The repositioning can be termed a success as the organization was awarded the Marketing Society's brand of the year in 2014 and voted number one in the Charity Brand Index in 2013. Macmillan employs 1,570 people directly, has 5,200 Macmillan Nurse posts and, in total, over 6,900 healthcare professional posts and 25,500 volunteers. Their ambition is to reach and improve the lives of everyone living with cancer. In 2016, Macmillan raised £245 million, which is a 7% increase on the previous year.

### *3.2. Data collection*

Data was primarily collected through semi-structured interviews across Macmillan Cancer Support's network between September 2011 and June 2015. This involved 21 interviews (see Table 2) with employees from various departments, such as fundraising (individual, events and corporate), communication (branding, creatives, and external communication), service development team (London and South West), Customer Relationship, and Data Insights. These were supplemented with interviews, including volunteers and the marketing agency which oversaw the repositioning. Data collection also included web searches and secondary document analysis in the form of strategic reports (e.g. Macmillan Cancer Support Annual Report, 2016) and news archives (e.g. Charity Times, Third Sector etc.). Interviews were semi-structured around the organization's mission and corporate heritage identity, positioning, communications, and fundraising practices as well as competitive pressures. Informants were asked to describe the corporate heritage identity challenges faced by Macmillan in the last few years and how various groups and individuals were responding.

Participants were chosen who had been through the change process of the organization. Participants were encouraged to engage in storytelling about incidents in the development of the new organizational direction, and the reactions of both themselves and others to the changing environment. Storytelling is a particularly insightful method for understanding participant interpretations of changing cultural environments, and therefore lends itself to gaining deep insight into the organizational heritage identity issues facing organizational insiders, and how they are managed (Martens, Jennings & Jennings, 2007). Primary interviews were recorded and transcribed, and on average lasted 90 minutes.

[Insert Table 2 here]

### *3.3. Data analysis*



Interview transcripts were coded through an open and coaxial coding approach, designed to aid in interpretivist theory development (Spiggle, 1994). Data was first analyzed at a surface level into areas of tension caused by the multiple role identities, and strategies for dealing with them. These areas were then categorized into specific forms of tension and approaches to managing the ensuing conflict. Internal validity and reliability were ensured through a constant comparative approach (Barnes, 1996), where stories from one interview were compared with comparable stories from other participants, internally and externally, and compared to documented history in secondary sources, such as websites, marketing communications, books and internal documents. Underlying rationales for the company's actions were inferred from this, resulting in suggested strategic approaches for managing the relative invariance of corporate and organizational heritage identity.

#### **4. Findings**

The research exposes many instances where tensions arise as different organizational members / employees try to reconcile their interpretation of organizational heritage identity in a changing environment. This is only exacerbated by the number of employees who strongly self-identify with the corporate heritage identity. To understand the process of navigating the dynamics of relative invariance amongst organizational members, the first part of the findings describes four of the complex tensions experienced by organizational members in navigating relative invariance in relation to multiple role identity types in Macmillan Cancer Support, as presented in Table 1. This list is not exhaustive, but indicative of the types of tensions that arose. In understanding these tensions, we found some employees positioning themselves as 'corporate heritage identity defenders', trying to maintain the historical traits of the institution, while others were driven to be 'service innovators', to prepare Macmillan for the future; and

hence were more willing to adopt new identity types moving forward. Following this is an exploration of the processes of responding to relative invariance in this multiple role identity setting. Table 3 presents brief examples of four tensions in response to relative invariance phenomena from our data.

[Insert Table 3 here]

#### *4.1. The paradox of relative invariance*

The corporate heritage identity trait of relative invariance is evident in Macmillan Cancer Support. While Macmillan appears to be invariant (unchanging) due to their enduring and iconic status as the leader in palliative cancer care, the charity is, in fact, changing to meet future demand from external stakeholders. Government budget cuts, increasing competition and the changing cancer story, are driving Macmillan to adapt the meaning of its corporate heritage identities, particularly from ‘end of life’ care to being a ‘life force’. Previous research suggests that relative invariance is a trait of corporate heritage identity institutions (Balmer, 2011b), yet our data suggests that navigating this relative invariance needs to consider employee’s role and identification with the organization in the process of mitigating emerging tensions during periods of change.

Macmillan’s success is largely attributed to its distinctiveness in palliative care. The high profile of the Macmillan Nurse has been the driving force in sustaining major fundraising events, such as the World’s Biggest Coffee morning. In 2016, coffee mornings raised £28.9 million, 7% more than the year before, and more than 10% of all income (Macmillan Cancer Support, 2016). However, the enduring symbol of the Macmillan Nurse appears to hinder other parts of the organization, such as online services and information provision. The continued use of the Nurse image ring-fences the organization into being perceived as only funding end of life care, which goes back to the earliest corporate heritage identity traits of the organization.

Although this is what they were formed to do, and is still very much part of their core activity, there are many new and innovative services that the charity promotes to improve the lives of everyone affected by cancer. This is a problem for Macmillan because the cancer story is changing. The number of people living beyond cancer will double from 2 million in 2010 to 4 million in 2030 (Macmillan Cancer Support, 2015). Macmillan, therefore, want to innovate, and improve their services to meet this growing demand. Equally, the number of new cancer charities is growing, directly targeting younger audiences with bolder voices. Consequently, many employees believe the meaning of Macmillan needs to adapt with the change; however, others disagree, believing that the original vision and the ability to provide existing services are hindered by a movement away from their core corporate heritage identity. The tension caused by trying to resolve this relative invariance of corporate heritage identity revolves around four distinct tensions, as presented below:

#### *4.1.1. Tension 1: Legacy vs Value to the market*

Macmillan's ambition and purpose is to help everyone affected by cancer. A strategic review, conducted in 2005, showed there was a need for a name change to better align with the purpose of the charity. With the support of a global brand agency, the management decided to change the name from Macmillan Cancer Relief to Macmillan Cancer Support. The word 'relief', associated with cancer pain, was deliberately dropped to shift the charity's perception from 'end of life' to being a 'life force'. However, the organization did not want to lose its corporate heritage identity, or the enduring success of Macmillan Nurse, in this process.

*"What you don't want to do is leave your heritage, you need to translate, to bring people with you. But if you can and it does differentiate you...give potential...give you fresh feel and opportunity...but it's ongoing." (Kate, Brand Manager)*

The brand manager demonstrates a clear feeling of tension between the legacy expressed in the palliative care identity (nurses and association with end of life) and purpose (life force for everyone affected by cancer). In this identity-challenging situation, organizational members became confused and perceived they were losing a sense of who Macmillan is. While all stakeholders identify with the Macmillan Nurse, many disagree with the need to translate the perception of the charity away from palliative care.

*“We thought after a point we wouldn’t talk about death. It was like, where did that come from? [laughs] Of course we talk about death, we’re a cancer charity.”* (Teresa, Creative Director)

Other employees worried about the stereotypes associated with nursing, because it may cause a real barrier for the organization to move forward, *“if people think that’s all that we’re about [palliative care] they won’t come to us when they’re very first diagnosed.”* (Kate, Brand Manager)

The recent ‘Not Alone’ campaign highlights this tension between living with, and dying of, cancer messaging with a negative impact on fundraising efforts. Angeline, Development Manager from fundraising states:

*“So there is a lot of social isolation ... to raise money for that is hard. Do we raise money so that people can go out and have a good social life, or do we raise money because people die?”*

The tension between employees in fundraising and in cause/service provision is evident. There are several services, such as rehabilitation, living well after cancer, getting back to work, and benefit advice, that need to be communicated in addition to the distinctiveness of Macmillan Nurse. These services are an important part of the organization moving forward, to

deal with cancer care of the future, but many key fundraisers and the collective societal memory of the charity are almost exclusively related to end of life care.

#### *4.1.2. Tension 2: Core vs peripheral activities*

Macmillan is involved in a diverse range of activities; however, there is disagreement about the degree to which corporate heritage related activity should constitute the core feature of the value created by the organization. This debate is important as it deals with the priority of competing identity claims.

*“In such a large organization with some very diverse audiences there are always conversations about priorities. But sometimes what might work from a fundraising point of view are not appropriate from a services point of view.”* (Annie, Head of Digital)

The Macmillan’s ‘World’s Biggest Coffee Morning’ event typically attracts older women supporters and has strong links to Macmillan nurses. It is a successful event in establishing the organization in the cancer charity sector, with some suggesting *“Coffee Morning is probably as powerful as Macmillan”* (Annie, Head of Digital). However, some organizational members believe that coffee mornings perpetuate the image of Macmillan as irrelevant for younger audiences. This puts pressure on fundraising and service members to innovate and find opportunities to engage younger audiences.

Some of the informants argue that Macmillan is trying to *“be everything to all people”* (Coco, Head of Brand) and lose sight of what it actually stands for. Hence, peripheral activities negatively affect the palliative care identity. Other informants, however, are particularly concerned by the lower priority of issues like survivor welfare. Mary argues that the Macmillan Nurse is important during treatment as a *“little part of your [cancer] journey”*, but 80% of women who are diagnosed with breast cancer early survive five years or more. They therefore

live through cancer well beyond the care of a Macmillan Nurse. However, some cancer patients may, for example, lose their homes when they have a cancer diagnosis, due to inability to work or from being self-employed.

*“If you think of the impact on people’s lives, our benefits advisors are probably just as important [as the Nurses]; getting you a grant for a washing machine, helping you keep your house warm. But when it comes to fundraising, Macmillan Nurses hold the money”*

(Beth, Patient Public Involvement)

Hence, the corporate heritage identity should also reflect the historically peripheral activities that are becoming more relevant in people’s lives. Some believe these activities should be at the forefront of brand communication, yet Macmillan Nurses are usually chosen as the image because they are perceived to draw more income. Conversely, on the volunteer side of the organization, there is a sense of resentment towards the heavy usage of Macmillan Nurse in their communications: *“So we’re not just the nurses...”* (Lynn, Fundraising Material Manager) as they are not relevant for targeting younger volunteers.

#### *4.1.3. Tension 3: Branding as professionalism vs. Outreach*

Macmillan’s name change and new visual expression causes considerable emotional reactions among stakeholders, particularly their identification with the organizational heritage identity. Although most fundraisers and the communications members welcome such radical change, as it helps to make Macmillan more distinctive in the market, several stakeholders shared their concerns during interviews regarding the professionalism of the new brand and its trivialization of the serious work they do. For Macmillan professionals, the choice of font appears to be rather *“childish”*. As the head of regional fundraising, who has gone through three name changes, explains,

*“Some professionals were quite shocked with the complete change, from this very nice Macmillan bow to suddenly this big paste symbol: We Are Macmillan...”* (Angeline, Development Manager)

One particular nurse who was working within palliative care felt *“threatened”* by the *“outgoing and very forward and pushing the boundaries image. The new image seems to constrict the image of professionalism and being seen as an ‘expert’”* (Annie, Head of Digital).

On the other side, fundraising committee members felt the change was a personal challenge. These members are usually older, loyal and conservative supporters. These committees are heavily involved in regional fundraising and contribute the single largest volume of fundraising income before the launch of Macmillan Coffee Mornings. They particularly feel dropping ‘Relief’ is a great loss to the charity, drawing it too far from its corporate heritage identity, and see the new direction as too modern. They feel excluded from the process: *“... it was absolutely top secret until this was presented to us. It was fait accompli! This is what is! You are having it!”* (Rosa, Head of Regional Fundraising). Others commented about the font being seen as *“graffiti”* (Remi, Business to Consumer Manager). From the fundraising perspective, the response has been positive; *“... it felt dramatic, we had leapt ahead of our competitors”* (Remi), and did appear to coincide with an increase in donation. However, the Nurses and committee members took longer to accept the new image and approach.

#### *4.1.4. Tension 4: Stakeholder communications - building relationship with cancer patients vs. connecting with new audiences*

It is evident through the data analysis that organizational members need to combine both social-fundraising and their social-care, cultural-life force and national service provision identity in one communication. This is, however, very complex because Macmillan is dealing with different target audiences in each of these spaces. For example, Teresa, Creative Director

explains: *“You get the tension between making the story engaging and eye catching and shocking enough for a fundraiser... But that could be very upsetting and frightening for people [dealing with cancer]”*. She later argued that if it is a story worth telling, and aligned with Macmillan’s mission, it is important that they don’t tone down their voices, even at the expense of upsetting cancer sufferers. This is because there are other cancer charities that use modern, fresh, short and snappy language that appeals to their audiences, and would divert funds away from Macmillan.

Another digital manager argues that changes in the digital landscape mean that Macmillan’s corporate heritage message should change accordingly. There is a clear tension between the duty to raise donations and duty to support their beneficiaries emotionally:

*“So a compromise would be if we were purely a fundraising brand, so if we weren't a service provider, then from your brand advertising you could probably dial that up and make it more emotional.”* (Annie, Head of Digital)

Within corporate partnership, there are similar corporate heritage identity-related communication issues. Macmillan works with many fundraising partners, such as Kenco and Marks and Spencer. However, as Teresa, Creative Director argues, partners don’t draw clear boundaries between different activities, tending to *“mix them all up”* in their communications. The act of engaging with a corporate partner means there is already complex messaging from Macmillan, but this should also tell a story for the corporate partner. Trying to stay true to all stakeholders in this instance becomes a major task to avoid causing undue offence or alienating any stakeholders.

Another tension also manifests in the event fundraising team, who prioritize income above service provision. In an extreme example, Tom, Head of Challenge Events explains that fundraisers competing in the name of Macmillan in the London Triathlon are not particularly



engaged with the brand; they just want entry into the event (guaranteed when representing the charity). Hence, when designing the communication message for this event, the team deliberately say nothing about cancer, or where the money goes. And yet, it is the most successful single event advertising they have.

*“... 60% of people who take part in an event for us want to do something for cancer, but they don’t necessarily see the difference between us and Cancer Research and Marie Curie ...” (Tom)*

They rationalized that once people signed up for the events, they can begin sharing the information about Macmillan. For example, in 2014, *“close to 40,000 people took part [in events] and ran for us ... of that 40,000, about 87% were certainly new to our database”*. However, this still means many institutional novices are making significant noise about the Macmillan identity, potentially leading to a dilution of the core corporate heritage identity traits.

#### *4.2. Strategies for maintaining relative invariance*

In overcoming these tensions, and to maintain relative invariance, two key strategies emerge. In some cases, Macmillan uses organizational-wide practice to deliberately integrate identities to anchor changing activities, purpose and action in corporate heritage identity traits. At other times, Macmillan utilizes a selective compartmentalization of particular activities to borrow from the rhetoric of the institutional heritage, but isolate activities from impinging upon the corporate heritage identity traits.

##### *4.2.1. Integration*

Instead of compromising between the national cultural identities of Macmillan Nurses, the cultural role identity as life force and social roles in fundraising and service delivery, Macmillan wants to create a virtuous understanding between different stakeholders of the inter-

relationship between fundraising, core and peripheral service activities. The goal is to change members' approaches to work. Macmillan has an initiative called 'Give Get' mantra to demonstrate a compelling rationale of how augmented identities could work together despite their differences. The aim of the program is to provide unity between fundraising, service provision and cultural role identity by engaging fundraisers in a dialogue about their potential need for Macmillan services. In essence, it is designed to help younger stakeholders, who have not experienced cancer, to identify with a future-self, who does need Macmillan. Equally, beneficiaries who use Macmillan services are engaged in a discussion on giving something back to the charity, in the form of fundraising. As a result, Macmillan's income has "*... grown in the last two or three years at 20% each year, which no other organization is doing*" (Eva, Director of Insight/Data).

Another example is the brand extension of Macmillan Nurse into life force roles, such as Macmillan Doctors, Physiotherapists, Occupational Therapists, Dietitians and Clinical Psychologists. In expanding the service delivery into living with cancer, but maintaining the Macmillan healthcare professional positioning, they can augment service delivery, without fundamentally changing stakeholder perceptions of the quality of care, and professional identity of Macmillan as a national cultural icon in cancer care.

However, to support such integration practices, Macmillan designed a matrix structure for their fundraising team to integrate them better with service delivery. For example, while the data management team used to be based within the fundraising department, one of the changes was to re-envision it as a cross-cutting function. A successful outcome of this cross-cutting data function was identifying that more people are living longer with cancer, but that people are particularly concerned by the psychological impact on their lives. Although Macmillan is well known in the nursing category, the organization realized it was doing little to tackle the loneliness associated with cancer. Hence, the launch of the 'Not Alone' campaign.

Another informant, Oliver, Resident Service Development Manager, adds that this campaign is easily adapted to regional service development: “... *no one should face cancer alone*” could be adapted to “... *no one in City X or no mother, no child should face cancer alone*”. This has been effective in reinforcing the link between Macmillan and cancer survivorship and is a step up in influencing change.

#### *4.2.2. Selective compartmentalization*

In other instances, tensions drawn out of the identity challenging situation disrupted the relevance and meaning of the organizational and corporate heritage identity to internal and external stakeholders. Macmillan responded by engaging in selective compartmentalization strategies. This is particularly noticeable in the encapsulation of different identities in the creation of new sub-brands that will be more meaningful to different stakeholder groups. Effectively, they created a nonprofit brand architecture. Reordering the brands in the form of brand architecture involved recognizing ‘one size does not fit all’. Macmillan needs to work out how these brands relate to one-another to reinforce the corporate heritage identity. The core supporters who are heavily involved in Macmillan Coffee Morning are strong supporters of the corporate heritage identity. However, to explore new opportunities for the younger generation who are increasingly affected by cancer, Macmillan launched several new fundraising products with distinctive sub-brands. For example, ‘Macmillan’s Night In’ targets younger women. Instead of going out, everyone gives what they would have spent on a night out to Macmillan. The event was launched in 2013 and 30,000 participants managed to raise £1.2m alongside corporate sponsor Sheila’s Wheels.

Another example is the ‘Brave the Shave’ campaign which challenges men and women to shave their heads. The sub-brand was highly successful with £4.35 million raised with 23,561 participants. Such selective compartmentalization enables Macmillan to reach out to

different audiences and engage in relevant conversations; and at the same time not alienating core supporters and reducing tension internally. With the creation of different sub-brands, one informant claims that it expands their opportunities to find new corporate partners that will fit the new target audience. Hence, not only is Macmillan able to engage with new audiences, but also increase their fundraising outcomes.

With several new sub brands being created, it is crucial for Macmillan to find a new guiding principle to communicate to different audiences in a consistent way, and not “*antagonize or alienate*” the core supporters. They thus created the Creativity Spectrum with different tones of voice that will suit each audience. It also allows supporters who want to make a poster for fundraising to decide which tone of voice would be most relevant for their work. For example, a sub-brand such as ‘Dress up and Dance’ is aimed at school kids and parents. So, staff and supporters can choose a more vibrant tone of voice in the spectrum. The spectrum also gives them permission to be bold when tackling more serious issues and exploring new territories for fundraising products.

## **5. Discussion**

In this article, we set out to elaborate on how heritage identity stewards cope with the complexities inherent in managing the relative invariance of corporate heritage identity. We focus specifically on the inherent tensions and strategies employed while managing an identity challenging, changing environment around cancer care in an evolving non-profit heritage organization. This allows us to build upon Balmer’s (2011b) claim that heritage organizations might appear to be invariant yet experience changes in, or the acquisition of, corporate identity traits over time. Through an in-depth exploration of the management of relative invariance in corporate heritage identity, our article makes several theoretical contributions.

### *5.1. Theoretical contributions*

First, we find a difference between corporate heritage identity defenders and service innovators, enabling us to elaborate on the key tensions between organizational members' multiple role identities in corporate heritage organizations (Balmer, 2011b; 2013) and the strategies employed to overcome them. Figure 1 summarizes the core findings from this case study and helps to make an instrumental contribution to the overall understanding of the navigation of the notion of relative invariance and how changing meanings of invariant corporate heritage identity traits can be incorporated by organizational members over time. We identify four core areas in which the distinct groups of employees (defenders and innovators) differ in perspective on how changes to corporate heritage identity could be managed regarding: (1) what is core purpose or legacy; (2) what is a central or peripheral activity; (3) variations in perceptions of identity ownerships; and (4) the content relevance of stakeholder communications. Although not exhaustive, even within this case, they do highlight the importance of two main groups of protagonists in shaping the future meaning of corporate heritage identity and what tensions may need to be managed in successful heritage identity stewardship. In so doing, we contribute a greater depth of empirical insight to the extant works of Balmer (2011b) and Burghausen and Balmer (2014; 2015) in their exposition of the role of organizational members in managing / stewarding the relative invariance of corporate heritage identity. We demonstrate how heritage identity stewardship is a collective endeavor, showcase a successful case study of how balancing the competing role identities of heritage defenders and service innovators facilitates the management of corporate heritage identity in identity challenging environments.

[Insert Figure 1 here]

Second, we contribute to prior research on the role of organizational members, such as employees. The employee's strong sense of attachment to multiple role identities appears to support a close interrelationship between corporate heritage identity (Balmer, 2011b; Balmer 2013) and organizational heritage identity domains (Balmer & Burghausen, 2015a; Balmer & Chen, 2015). Both conceptualizations are fundamentally important, but also problematic when organizational members face an identity challenging situation. Unlike previous research, in this case, we found a challenge to the corporate heritage identity can lead to extensive changes in organizational architecture, systems, processes and practices, to maintain the relative invariance of corporate heritage identity. This is doubly challenging where the heritage activities are still part of future service provision. What the case demonstrates is the complexity of navigating the relative invariance of corporate heritage identity and that the process of doing so requires proactive management of competing meanings. In contrast to Balmer & Chen's (2017a) study on Tong Reng Tang, which shows the attractiveness of core and augmented role identity (e.g. Imperial identity) for external stakeholders such as consumers, we show that internal stakeholders, such as employees, may find it difficult to balance the competing demands of augmented role identities. Consequently, some employees feel the need to defend the heritage traits more than others would.

The pattern of corporate heritage identity defenders and service innovators that we uncover builds upon Levy and Scully's (2007) identification of the role of institutional entrepreneurs and institutional defenders in change processes in organizations. Here, they identify institutional entrepreneurs as important and valuable protagonists in overcoming the conservative and backward thinking defenders in ensuring progressive development. This mindset, that defenders must be overcome, predominates in the institutional entrepreneurial field (Battilana, Leca & Boxenbaum, 2009). In organizational heritage institutions, however, the relative importance of both the corporate heritage identity defender and the service

innovator (institutional entrepreneur) is potentially more balanced. The core of understanding the organization's unique character is rooted in a series of corporate heritage identity traits that need protecting from radical change (Curran et al., 2016). Areas of service delivery may need to evolve or innovate, and even the name and meaning of the institution may need to be adapted to maintain purpose for the future; nevertheless, in this case, the corporate heritage identity defenders act as anchors for the omni-temporal nature of corporate heritage identity in the institution. Without the corporate heritage identity defenders protecting those elements that make the institution unique, they could easily slip into chasing the service delivery / fundraising zeitgeist of the day, thus becoming undifferentiated from other organizations in the field. This anchoring also allows the legacy of corporate heritage identities around care, national cultural iconography and territorial identity to have meaning in new spaces, through increased service provision (e.g. Macmillan Clinical Psychologists) and new income initiatives (e.g. Brave the Shave). Both strategies that flow from attempting to overcome relative invariance tensions require a balance between the corporate heritage identity defender and the service innovator to reshape the meaning of corporate heritage identity to keep it meaningful for the future. Accordingly, an important contribution of this work is building on Burghausen & Balmer (2015) through focusing on the practices of stewardship in heritage institutions. By doing so, we address recent calls to shift attention to understanding the relevance and effects of organizational heritage identity and the organizational past as a source for organizational heritage identity and member identification within organizations, and to elaborate on the continuity and change inherent in managing corporate heritage identities (Balmer, 2011b; 2013).

Third, we identify a pattern of navigating relative invariance: integration and/or selective compartmentalization, allowing organizational members to make sense of the different meanings and overcome internal conflicts related to relative invariance. Such conflicts

can be very harmful for heritage organizations (Glynn, 2000) because members adhere strongly to a specific heritage role identity and may resist an alternative logic. The success of Macmillan shows that, despite the tensions caused by conflicting organizational member identification and competing meanings, the process helps the organization to challenge hidden assumptions and beliefs about multiple meanings in its corporate heritage identity in the past, the present and the future. Such debate provides a platform to break down boundaries that previously existed between different domains; deliberately forcing the organization and its members to make sense of new opportunities and move away from sector conventions (Blombäck & Brunninge, 2013). This mirrors recent streams of research on responses to competing demands, which recognize that multiple institutional modes of actions can create opportunities rather than harms (Battilana & Dorado, 2010; Greenwood et al, 2011). More specifically, the practice of integration parallels “selective coupling” in social enterprises which suggests ‘instead of adopting strategies of decoupling, or compromising, organizations selectively coupled intact elements prescribed by each logic to project legitimacy to external stakeholders’ (Pache & Santos, 2013, p. 972). Macmillan’s Give Get mantra was a good example of how augmented role identities could work together instead of compromising different role identities amongst employees. This practice appears to be superior as it helps heritage organizations to create new initiatives that are a hybridization of demands from different heritage role identities.

Conversely, there are also instances in which the images of corporate heritage identity can be a hindrance to the activities of living up to the organizational purpose and corporate heritage identity. Here we identify compartmentalization strategies, where corporate heritage identity activities are separated into their own communications vehicles, to maintain continuity, but allow for flexibility. The solution Macmillan found is a novel approach for nonprofits, but something very common in corporate entities: brand architecture (Aaker & Joachimsthaler, 2000). Most nonprofits have an organizational brand; not sub-brands or brand portfolios. By



mimicking brand architecture from corporate brand portfolios and treating different fundraising vehicles as unique products, nonprofits can communicate differently with different audiences, complementing the works of Rindell, Santos and De Lima (2015) and Blombäck and Brunninge (2016), both of which identify corporate heritage brands portraying different corporate heritage identity images to different stakeholders. We show that each of Macmillan's fundraising sub-brands has a clear target customer, allowing for unique communication that does not undermine the core corporate heritage identity. We consider this to be a good strategy for both corporate heritage brands and nonprofits more generally. Through both the sub-brand and Creative Spectrum, Macmillan could expand beyond its corporate heritage identity messaging without alienating entrenched, but valuable, stakeholders.

Further, and more broadly, the study shows a greater spectrum of stakeholder interpretations of corporate heritage identity. As discussed in the literature review, extant research has focused on external stakeholders, such as customer interpretations (Balmer & Chen, 2017a; Rindell et al., 2015; Wiedmann et al., 2011), and internal stakeholders, including managers and employees (Balmer, 2009; 2011b; Burghausen & Balmer, 2014, 2015). The use of a nonprofit organization provides the opportunity to explore different perspectives from multiple engaged stakeholders beyond the commercial realm. What this study suggests is that identification with corporate and organizational heritage identity is pervasive across a very broad spectrum of stakeholders, even those with limited engagement. This extends Urde et al.'s (2007) work beyond managerial stewardship of the corporate, to show that stakeholders have many core similarities in their understanding of corporate heritage identity but have highly divergent views on future orientation. Priming future orientation alongside corporate heritage identity helps to minimize tensions caused by changing orientation. However, this leads to far more complex messaging. Complex messages, especially in nonprofit organizations, disconnect target audiences from the core heritage identity traits, because the core message

becomes confused and less marketable. Ultimately, allowing flexibility in messaging is essential to speak to different audiences, but keeping the messages with core elements that speak to all stakeholders helps to prevent brand dilution. Therefore, Macmillan's approach, developing a Creative Spectrum, allows core messages to be communicated but allows for flexibility in tone of voice and content style. This does produce its own issues in terms of management time but allows for greater communication flexibility with multiple stakeholders across a sub-brand portfolio.

### *5.2. Managerial implications*

The management implications of this study speak to both corporate heritage identity stewardship and nonprofit heritage marketers. In terms of corporate heritage identity stewardship, the importance of a strong voice for corporate heritage identity defenders is vital to ensure continuance of corporate heritage identity traits during turbulent environmental conditions. However, stewards should look for means of harnessing the power of corporate heritage identity into new business models or service lines. This can be done in a structured way, with integration type strategies, to ensure corporate heritage identities and services lines align. Alternatively, it can be achieved with a softer touch with compartmentalization strategies, in which elements of the corporate heritage identities are utilized but a greater level of flexibility is offered in terms of tone of voice when communicating with a variety of stakeholders.

As to the implications for nonprofit heritage marketers, we identify the value of viewing nonprofit brands with a brand architecture approach. By viewing both fundraising activities and service lines as product-lines or brands, non-profits can better target both types of activity to specific audiences, without jeopardising relationships with other core-stakeholders.

However, by maintaining an element of the overarching brand, they can still retain the trust and brand associations linked to the corporate level brand.

### *5.3. Research limitations & further research*

This research has several limitations. The case study approach used in this study limits the extent to which the findings can be generalized to other contexts. Our work certainly contributes to the growing stream of research related to corporate heritage identity and more recently organizational heritage identity (Balmer, 2006, 2011b, 2017; Urde et al., 2007). Although our study extends this research into the nonprofit heritage brands space, organizational heritage identification is not specific to nonprofit organizations. As with other corporate heritage brands, our case has multiple role identities and thus exposes the challenges and opportunities associated with navigating relative invariance in multiple-identity organizations. As this field is very much in its infancy, a single case can expose phenomena of potentially general importance for further studies. It highlights the importance of considering the degree to which heritage organizations are active in dealing with the challenges associated with relative invariance. For example, some corporate heritage brands may be forced to adopt new meanings or even drop the corporate heritage identity to sustain their market position.

Future research may further explore how internal and external stakeholders internalize the meanings of corporate heritage identity (Bhattacharya & Sen, 2003). The degree and strength of organizational identification may be different for different stakeholders depending on several factors, which are beyond the scope of this study. However, it would be insightful to examine the influence various internal and external stakeholders have over the management and stewardship of corporate heritage identity over time.

Furthermore, although we have begun to explore how organizational members engage in the process of managing the relative invariance of corporate heritage identity, future research needs to track if these identifications remain or change over time. It will be useful to explore contexts in which corporate heritage identity is uncontested (i.e. no service innovators) during identity challenging situations, or conversely, where service innovators dominate, as espoused by Levy and Scully (2007). Such research would require a longitudinal study to follow organizational members' lived experience of the relative invariance of corporate heritage identity.

## **6. Conclusion**

This research makes several theoretical contributions to the nascent fields of corporate heritage identity (Balmer, 2011b, 2013) and organizational heritage identity (Balmer & Chen, 2015; Balmer & Burghausen, 2015a) by advancing the extant work on the functioning of relative invariance. The study shows support for the importance of relative invariance and demonstrates that careful and active management of relative invariance is the nexus of heritage identity stewardship, particularly in an identity challenging situation. It is through maintaining heritage identity traits, while allowing meaning to adapt over time, which allows heritage identity organizations to perpetuate over multiple generations without losing relevance.

The study broadens discussion of the tensions inherent in the multiple role identities of corporate heritage identity organizations. We focus on the differing interpretations of role identities among employees. Instead of viewing them as mutually exclusive, we acknowledge that these role identities are interrelated and can co-exist over time. They should not be viewed in isolation. Champions of specific role identities may view heritage identity traits as obstacles for future role identities, whereas others may see them as core to the perpetuation of the

organization's purpose. Hence, how heritage identity stewards balance these competing claims is essential in perpetuating and communicating identity in an omni-temporal way. Further, the theoretical framework presents two key mechanisms: Integration and Selective Compartmentalization that can be used to create the required balance. By doing so, our study extends our comprehension of the challenges to maintaining organizational identities, particularly in a change situation. Hence, by furthering the research agenda into the stewardship of relative invariance of corporate heritage identity, this study advances the notion of relative invariance (Balmer, 2011b) and exposes this phenomenon as a key area for future research in understanding how heritage identity organizations maintain their relevance to society.

In practice, this study suggests that managers should view the conflicting tensions present during periods of identity challenge as a useful resource to identify how and why different members' organizational heritage identity claims relate to corporate heritage identity and how both can be aligned with past and future orientations to explore new market opportunities. We find the existence of both corporate heritage identity defenders and service innovators, who have numerous points of tension regarding changes to the fabric of the organization. However, within these tensions is the route to navigating relative invariance in heritage institutions. Where tensions are reconcilable through integrative practices, both corporate heritage identity and evolving service provision are strengthened. However, when tensions are not reconcilable, selective compartmentalization of activities can allow for utilization of corporate heritage marketing, without impinging upon the social role identities which may, at times, be in conflict.

## References

- Aaker, D. A., & Joachimsthaler, E. (2000). The brand relationship spectrum: The key to the brand architecture challenge. *California Management Review*, 42(4), 8-23.
- Albert, S., & Whetten, D. A. (1985) Organizational identity. *Research in Organizational Behaviour*, 7, 263-295.
- Ashforth, B. E., & Mael, F. (1989). Social identity theory and the organization. *Academy of Management Review*, 14(1), 20-39.
- Balmer, J. M. T. (1998). Corporate identity and the advent of corporate marketing. *Journal of Marketing Management*, 14(8), 963-996.
- Balmer, J. M. T. (2004). The British Monarchy as a corporate brand: does the Crown as a corporate brand fit? Working paper No. 014/6, Bradford School of Management, Bradford.
- Balmer, J. M. T. (2008). A resource-based view of the British Monarch as a corporate brand. *International Studies of Management and Organization*, 37(4), 20-45.
- Balmer, J. M. T. (2009). Scrutinising the British Monarchy. The corporate brand that was shaken, stirred and survived. *Management Decision*, 47(4), 639-675.
- Balmer, J. M. T. (2011a). Corporate heritage brands and the precepts of corporate heritage brand management: Insights from the British monarchy on the eve of the royal wedding of Prince William (April 2011) and Queen Elizabeth II's Diamond Jubilee (1952-2012). *Journal of Brand Management*, 18(8), 517-544.
- Balmer, J. M. T. (2011b). Corporate heritage identities, corporate heritage brands and the multiple heritage identities of the British monarchy. *European Journal of Marketing*, 45(9/10), 1380-1398.
- Balmer, J. M. T. (2013). Corporate heritage, corporate heritage marketing, and total corporate heritage communications. *Corporate Communications: An International Journal*, 18(3), 29-326.
- Balmer, J. M. T. (2017). *Foundations of Corporate Heritage* (eds.). London: Routledge, Taylor & Francis Group.
- Balmer, J. M. T. & Burghausen, M. (2015a). Introducing organisational heritage: Linking corporate heritage, organisational identity and organisational memory. *Journal of Brand Management*, 22(5), 385-411.
- Balmer, J. M. T. & Burghausen, M. (2015b). Explicating corporate heritage, corporate heritage brands and organisational heritage. *Journal of Brand Management*, 22(5), 364-384.
- Balmer, J. M. T. & Burghausen, M. (2018). Marketing, the past and corporate heritage. *Marketing Theory*, 1470593118790636 (in press).
- Balmer, J. M. T. & Chen, W. (2015). Corporate heritage brands in China: Consumer engagement with China's most celebrated corporate heritage brand – Tong Ren Tang. *Journal of Brand Management*, 23(3), 194-210.

- Balmer, J. M. T. & Chen, W. (2017a). Corporate heritage brands, augmented role identity and customer satisfaction. *European Journal of Marketing*, 51(9/10), 1510-1521.
- Balmer, J. M. T. & Chen, W. (2017b). Corporate heritage tourism brand attractiveness and national identity. In Balmer, J. M. T. (Ed.), *Foundations of Corporate Heritage* (p.214-243). London: Routledge Taylor & Francis Group.
- Balmer, J. M. T., Greyser, S.A. & Urde, M. (2006). The crown as a corporate brand: insights from monarchies. *Journal of Brand Management*, 14(1/2), 137-161.
- Balser, D., & McClusky, J. (2005). Managing stakeholder relationships and nonprofit organization effectiveness. *Nonprofit Management and Leadership*, 15(3), 295-315.
- Barnes, D. M. (1996). An analysis of the grounded theory method and the concept of culture. *Qualitative Health Research*, 6, 429-41.
- Battilana, J., & Dorado, S. (2010). Building sustainable hybrid organizations: The case of commercial micro finance organizations. *Academy of Management Journal*, 53(6), 1419-1440.
- Battilana, J., Leca, B., & Boxenbaum, E. (2009). How actors change institutions: towards a theory of institutional entrepreneurship. *Academy of Management Annals*, 3(1), 65-107.
- Bhattacharya, C. B., & Sen, S. (2003). Consumer-company identification: A framework for understanding consumers' relationships with companies. *Journal of Marketing*, 67(2), 76-88.
- Billis, D. (2010). *Hybrid Organizations and the Third Sector: Challenges for Practice, Theory, and Policy*. Palgrave Macmillan, London.
- Blombäck, A. & Brunninge, O. (2013). The dual opening to brand heritage in family businesses. *Corporate Communications: An International Journal*, 18(3), 327-346.
- Blombäck, A., & Brunninge, O. (2016). Identifying the role of heritage communication: A stakeholder-function framework. *International Studies of Management & Organization*, 46(4), 256-268.
- Brown, A. D., & Humphreys, M. (2006) Organizational identity and place: A discursive exploration of hegemony and resistance. *Journal of Management Studies*, 43(2), 231-257.
- Burghausen, M. & Balmer, J. M. T. (2014). Corporate heritage identity management and the multi-modal implementation of a corporate heritage identity. *Journal of Business Research*, 67, 2311-2323.
- Burghausen, M., & Balmer, J. M. T (2015). Corporate heritage identity stewardship: A corporate marketing perspective. *European Journal of Marketing*, 49(1/2), 22-61.
- Bunninge, O. (2017). Family heritage in corporate heritage branding: opportunities and risks. In Balmer, J. M. T. (Ed.), *Foundations of Corporate Heritage* (p.260-271). London: Routledge Taylor & Francis Group.

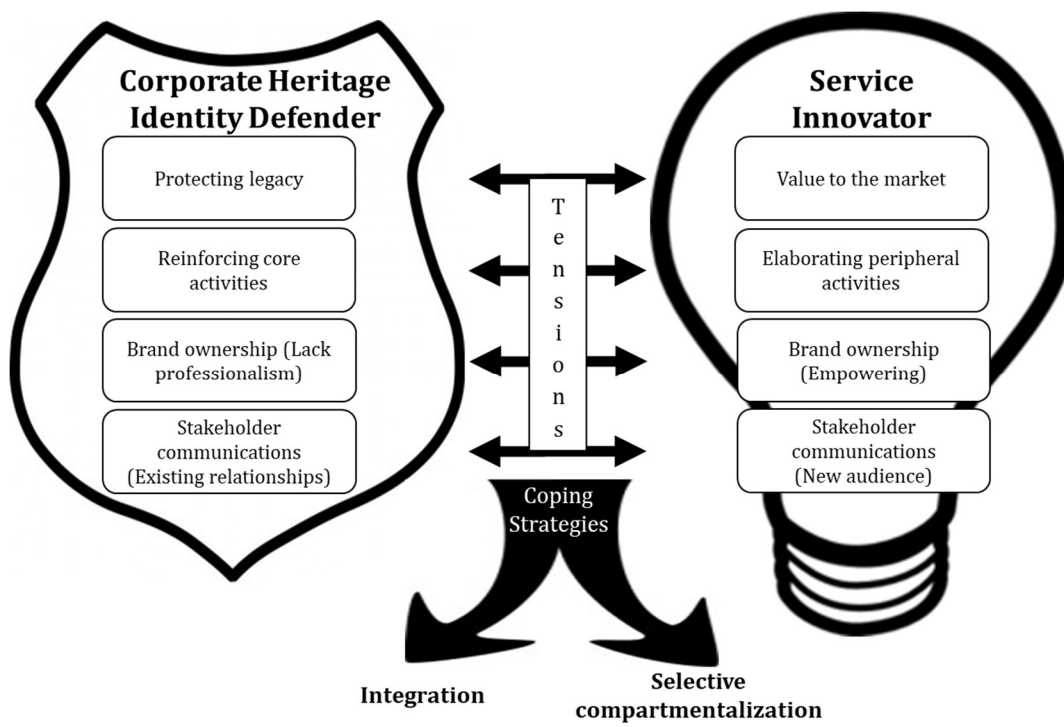
- Brunninge, O. & Hartmann, B. J. (2018). Inventing the past: Corporate heritage as dialectical relationships of past and present. *Marketing Theory*, 1470593118790625
- Chenhall, R. H., Hall, M., & Smith, D. (2016). Managing identity conflicts in organizations: A case study of one welfare nonprofit organization. *Nonprofit and Voluntary Sector Quarterly*, 45(4), 669-687.
- Cornelissen, J. P., Haslam, S. A. and Balmer, J. M. T. (2007). Social identity, organizational identity and corporate identity: towards an integrated understanding of processes, patternings and products. *British Journal of Management*, 18, S1-S16.
- Curran, R., Taheri, B., MacIntosh, R., & O’Gorman, K. (2016). Nonprofit brand heritage: Its ability to influence volunteer retention, engagement, and satisfaction. *Nonprofit and Voluntary Sector Quarterly*, 45(6), 1234-1257.
- Dutton, J. E., & Dukerich, J. M. (1991). Keeping an eye on the mirror: Image and identity in organizational adaptation. *Academy of Management Journal*, 34(3), 517-554.
- Elsbach, K. D., & Kramer, R. M. (1996). Members' responses to organizational identity threats: Encountering and countering the Business Week rankings. *Administrative Science Quarterly*, 442-476.
- Ewing, M. T., & Napoli, J. (2005). Developing and validating a multidimensional nonprofit brand orientation scale. *Journal of Business Research*, 58(6), 841-853.
- Gillham, B. (2010). *Case study research methods*. Bloomsbury Publishing. London.
- Gioia, D. A., Patvardhan, S. D., Hamilton, A. L., & Corley, K. G. (2013). Organizational identity formation and change. *Academy of Management Annals*, 7(1), 123-193.
- Glynn, M. A. (2000). When cymbals become symbols: Conflict over organizational identity within a symphony orchestra. *Organization Science*, 11(3), 285-298.
- Greenwood, R., Raynard, M., Kodeih, F., Micelotta, E. R., & Lounsbury, M. (2011). Institutional complexity and organizational responses. *Academy of Management Annals*, 5(1), 317-371.
- Hannan, M. T., Baron, J. N., Hsu, G., & Koçak, Ö. (2006). Organizational identities and the hazard of change. *Industrial and Corporate Change*, 15(5), 755-784.
- Hatch, M. J. & Schultz, M. (2003). Bringing the corporation into corporate branding. *European Journal of Marketing*, 37(7/8), 1041-1064.
- Kylander, N., & Stone, C. (2012). The role of brand in the nonprofit sector. *Stanford Social Innovation Review*, 10(2), 35-41.
- Leitch, S., & Motion, J. (1999). Multiplicity in corporate identity strategy. *Corporate Communications: An International Journal*, 4(4), 193-200.
- Levy, D., & Scully, M. (2007). The institutional entrepreneur as modern prince: The strategic face of power in contested fields. *Organization Studies*, 28(7), 971-991.



- Macmillan Cancer Support. (2016). Annual Report and Accounts 2016. Retrieved from [https://www.macmillan.org.uk/\\_images/macmillan-cancer-support-annual-report-2016-overview\\_tcm9-313610.pdf/](https://www.macmillan.org.uk/_images/macmillan-cancer-support-annual-report-2016-overview_tcm9-313610.pdf/) Accessed 15 September 2017.
- Martens, M. L., Jennings, J. E., & Jennings, P. D. (2007). Do the stories they tell get them the money they need? The role of entrepreneurial narratives in resource acquisition, *Academy of Management Journal*, 50 (5), 1107-1132.
- Merchant, A., & Rose, G. M. (2013). Effects of advertising-evoked vicarious nostalgia on brand heritage. *Journal of Business Research*, 66(12), 2619-2625.
- Miller, D. & Merrilees, B. (2013). Rebuilding community corporate brands: a total stakeholder involvement approach. *Journal of Business Research*, 66, 172-179.
- Mohart, F., Malär, L., Guèvremont, A., Girardin, F. & Grohmann, B. (2015). Brand authenticity: An integrative framework and measurement scale. *Journal of Consumer Psychology*, 25(2), 200-218
- Mort, G. S., Weerawardena, J., & Williamson, B. (2007). Branding in the non-profit context: the case of Surf Life Saving Australia. *Australasian Marketing Journal (AMJ)*, 15(2), 108-119.
- Napoli, J. (2006). The impact of nonprofit brand orientation on organisational performance. *Journal of Marketing Management*, 22(7-8), 673-694.
- Nissley, N., & Casey, A. (2002). The politics of the exhibition: Viewing corporate museums through the paradigmatic lens of organizational memory. *British Journal of Management*, 13(S2).
- Pache, A. C., & Santos, F. (2013). Inside the hybrid organization: Selective coupling as a response to competing institutional logics. *Academy of Management Journal*, 56(4), 972-1001.
- Petriglieri, J. L. (2011). Under threat: Responses to and the consequences of threats to individuals' identities. *Academy of Management Review*, 36(4), 641-662.
- Reger, R. K., Gustafson, L. T., Demarie, S. M., & Mullane, J. V. (1994). Reframing the organization: Why implementing total quality is easier said than done. *Academy of Management Review*, 19(3), 565-584.
- Rindell, A., Santos, F. P. & De Lima, A. P. (2015). Two sides of a coin: Connecting corporate heritage to consumers' corporate image heritage. *Journal of Brand Management*, 22(5), 457-484.
- Ross, P. N. (2009). *Fighting cancer with more than medicine: A history of Macmillan Cancer Support*. The History Press: Stroud.
- Siggelkow, N. (2007). Persuasion with case studies. *Academy of Management Journal*, 50(1), 20.
- Spiggle, S. (1994). Analysis and interpretation of qualitative data in consumer research. *Journal of Consumer Research*, 21(3), 491-503.

- Tripsas, M. (2009). Technology, identity, and inertia through the lens of “The Digital Photography Company”. *Organization Science*, 20(2), 441-460.
- Urde, M., Baumgarth, C. & Merrilees, B. (2013). Brand orientation and market orientation – From alternative to synergy. *Journal of Business Research*, 66(1), 13-20.
- Urde, M., Greyser, S. & Balmer, J. M. T. (2007). Corporate brands with a heritage. *Journal of Brand Management*, 15(1), 4-19.
- Walsh, J. P., & Ungson, G. R. (1991). Organizational memory. *Academy of Management Review*, 16(1), 57-91.
- Wiedmann, K. P., Hennings, N., Schmidt, S. & Wuestefeld, T. (2011). The importance of brand heritage as a key performance driver in marketing management. *Journal of Brand Management*, 19(3), 182-194.
- Yin, R. (2003). *Case Study Research: Design and Methods*, 4th edition. Sage Publications, London.

**FIGURE**



**Figure 1:** Dynamic tensions in navigating relative invariance

## TABLES

**Table 1: Macmillan's adherence to Balmer's (2013) corporate heritage criteria**

<i>Heritage Criteria</i>	<i>Definition</i>	<i>Macmillan's evidence</i>
1.Omni-temporality	Subsisting in temporal strata - of the past, present and prospective future	Dating back to 1911, Macmillan Cancer Support is one of the oldest and best-known cancer charities in the UK. Despite undergoing three key organizational changes in 1977, 1989 and 2006, there remains a strong respect for, and use of, Macmillan's past and tradition, as well as its future, particularly in adapting to the changing cancer story. People are living longer with cancer; hence the practical, emotional and financial need to revisit the identity to make it relevant for contemporary contexts.
2.Institutional trait consistency	The continuity of meaningful organizational traits	Macmillan has an enduring institutional trait. Its raison d'être relates to improving the lives of people with cancer. Therefore, past, present and future planned activities are designed around cancer patients' needs. For example, cancer affects all aspects of a person's life, not only their physical health. Recently, Macmillan launched a successful 'Not alone' campaign to tackle the issue of loneliness associated with cancer. Consistent with Macmillan's institutional trait, they also conducted extensive campaigns with the government; consequently, the government has set out an end-of-life care action plan for England.
3.Trigenerational hereditary	The organization must have been in existence, and meaningful, for a minimum of three generations	Multiple generations of families have benefitted from their association with Macmillan. Not only in terms of cancer care, but also in fundraising. The World's Biggest Coffee Morning remains one of the most high-profile annual charity fundraising events. In 2016, the event alone raised £28.9 million and has cultivated multigenerational loyalty and familiarity among its donors and other stakeholders.
4.Augmented role identities	Corporate heritage institutions are infused with multiple role identities including territorial, cultural, social and ancestral identity	<p>1. Macmillan has a <u>Territorial identity</u> as the key service provider in the UK's NHS with respect to palliative cancer care. They even lobbied Government to commit to improving cancer care experience in England, Wales and Scotland.</p> <p>2a. The charity has a <u>National Cultural identity through its Macmillan Nurses</u> being the cultural manifestation of palliative cancer care. With the Nurses lovingly called the "Angels of Death" as a bright light in the otherwise murky lived experience of terminal cancer sufferers.</p> <p>2b. Macmillan also has a <u>Cultural Role identity as a Life force</u>. The cancer story is changing, and more people are diagnosed and living with cancer, with patients and family supported by Macmillan</p> <p>3a. They have a multi-generational <u>Social Care identity</u> as the main provider of holistic cancer care services starting as a prevention and relief charity following Douglas Macmillan's vision in 1911. This continues to the present day through an ever increasing range of care services provided by Macmillan.</p> <p>3b. They also have a <u>Social Role identity as a fundraiser</u>, assisted not only by full time staff and NHS staff, but also through an army of 25,500 volunteers and fundraisers, all with linked social identity to Macmillan, making Macmillan the third largest charity in the UK based on income.</p>
5.Ceaseless multigenerational stakeholder utility	Demonstrate salience for consecutive generations of stakeholders	Macmillan has shown continuous ability to meet the wants and needs of successive generations of donors, beneficiaries and other stakeholders. From its origins, through ongoing service in hospice care, to the burgeoning number of roles filled by Macmillan trained carers in the NHS, it has provided multiple generations of cancer sufferers with vital support that is not provided by other institutions.

6. Unremitting management tenacity	Assiduous management of corporate heritage institutions	Macmillan has been through three major periods of change in 1977, 1989 and 2006. However, the core tenets of Douglas Macmillan persist, not only in name, but also in vision and action to ensure Macmillan can meet the present and future needs of those living with cancer.
------------------------------------	---	--

**Table 2: Informants and details**

No	Pseudo Name	Position
1	Teresa	Creative Director
2	Eva	Director of Insight/Data
3	Coco	Head of Brand
4	Kate	Brand Manager
5	Pete	Senior Brand Manager
6	Remi	Business to consumer Brand Manager
7	Annie	Head of Digital
8	Tom	Head of Challenge Event
9	Rosa	Head of Regional Fundraising
10	Emily	Head of Customer Care
11	Elizabeth	Head of Partnership Management
12	Lynn	Fundraising Material Manager
13	Mike	Senior Development Manager, South West
14	Oliver	Resident Service Development Manager, South West London
15	Mary	Patient/Carer Involvement NHS
16	Beth	Patient Public Involvement
17	Angeline	Development Manager
18	Susan	Corporate Partnership Manager
19	Margaret	Macmillan Committee Chair
20	Winston	Local Volunteering Manager
21	Martin	Creative Director at Global Brand Agency

**Table 3: Examples of tensions in response to relative invariance**

Corporate heritage identity defenders	Service innovators
<p>a. <i>Legacy Protecting care identity</i> Many members still see Macmillan as a palliative cancer charity; hence a strong identification with Macmillan Nurses. This means that ‘end of life’ is always in people’s mind.</p>	<p>a. <i>Value to the market - ensuring future service relevance</i> Brand managers are keen to improve and change the image, and meaning, of Macmillan Nurses. There is a need to refresh, leading to a move away from ‘end of life’ identity to ‘life force’ identity. Their latest ‘Not Alone’ campaign, which aired on TV in the last three years, has been very successful in generating positive associations other than medicine and cancer diagnosis.</p>
<p>b. <i>Reinforcing core activities (protecting fundraising identity)</i></p>	<p>b. <i>Elaborating peripheral activities (widening services)</i></p>

---

Macmillan has been funding its NHS Macmillan Nurses since 1975, and those in hospices for over 100 years, and continues to fund these core activities to meet the demand of cancer patients. Through this association, Macmillan also runs one of the most powerful fundraising tools in the UK - 'The World's Biggest Coffee Morning'. This is an annual fundraising event, focused on palliative nursing care, and appeals to traditional and older supporters. However, this may ring fence the charity as only relevant to elderly supporters.

*c. Brand ownership - lack professionalism*

The new brand identity is supposed to reflect the heritage of the organization, but was perceived by Macmillan's professionals, such as nurses and doctors, as 'childish' and not reflecting the sense of professionalism of their work role.

*d. Stakeholder communication – building relationships with cancer patients*

Macmillan is both a fundraising and service delivery cancer charity. Different members may need a different style and tone of communication to sustain the relationships. Service delivery members believe that communications should follow the expectation of cancer sufferers; for example, in a warm and friendly way that is not upsetting.

Organizational members in service delivery wish to prioritize other (non-palliative care) activities, such as financial services and emotional welfare, which are key in helping patients to restart their lives after cancer.

*c. Brand ownership - empowering*

Fundraising members see the new identity and meaning as empowering; and expect this to have a positive impact in the future. They believe that the increase in donations was a result of the new brand image and meaning.

*d. Stakeholder communication - connecting with new audience*

To reach all cancer patients, some organizational members think that they should not 'tone down' their voices. Although it may be upsetting to hear, it is important that the message comes across to new audiences; for example, younger cancer patients. This is also particularly evident in connecting with new corporate partners, increasing presence in the digital space, and developing new fundraising products.

---